



Company Name: _____

Documents Checklist: Please make sure you have all pertinent documents related to your business included with your application.

For ALL APPLICANTS

- _____ a. Application
- _____ b. Full Federal Tax Return for the last 3 years or as many years as you have been in business. If your business has not yet filed a Federal Tax Return, please include a financial statement including balance sheet and income statements.
- _____ c. Documentation of how owner(s) acquired the business. Please provide at least one (1) of the following: cancelled check, bank receipt, stock certificate, loan agreement.
- _____ d. Current resumes for your company's principal stakeholders showing relevant experience.
- _____ e. Government issued form of identification of business owner(s) such as:
 - U.S. Passport or a U.S. Passport Card;
 - Permanent Resident Card or an Alien Registration Receipt Card (Form I-551);
 - Foreign passport;
 - Employment Authorization Document that contains a photograph (Form I-766);
 - Driver's license or an ID card issued by a state or possession of the United States provided it contains a photograph; or
 - U.S. Military ID card.

For a CORPORATION

- _____ a. Articles of Incorporation and all amendments thereto
- _____ b. Corporation By-Laws and amendments thereto
- _____ c. Minutes of first corporate organizational meeting

For a PARTNERSHIP

- _____ a. Partnership agreement, including buy-out rights and profit sharing agreement

For a LIMITED LIABILITY COMPANY

- _____ a. Articles of Organization
- _____ b. Operating Agreement

For a VETERAN OWNED BUSINESS ENTERPRISE

- _____ a. Certification Letter from the U.S. Department of Veterans Affairs

For a NON-PROFIT

- _____ a. Federal Tax Exempt Form 501 c(3) or c(4)
- _____ b. Articles of incorporation and all amendments thereto

1. Does your company have an affiliation with any other company? Yes No
 If yes, please provide the following information:

Affiliate Name(s) and/or Owners _____

Business Address _____

Business Phone Number _____ Website _____

2. Has your business ever been sold and/or reorganized? Yes No
 If yes, please explain when, why and how your business was sold and/or reorganized.

3. If your business is a corporation or a non-profit, please list your current Board of Directors/Trustees.

Name	Address	Race / Ethnicity	Gender	Date Elected/Appointed

4. Please provide the names of up to three principals, the percent of ownership, gender, race / ethnicity, and their daily responsibilities. Daily responsibilities include, but are not limited to: Surety and/or Performance Bonds, Insurance, Payroll, Job Supervision, Hiring and Firing, Inventory, Financial Decisions, Seeking and Negotiating Contracts, Management Decisions, or Accepting and Rejecting Bids

Principal (s) Name	% of Ownership	Gender	Race / Ethnicity	Daily responsibilities

5. If not indicated above, who is responsible for the following:

	Name	Race / Ethnicity	Gender	Title
Surety and or Performance Bonds				
Insurance				
Payroll				
Job Supervision				
Hiring and Firing				
Inventory				
Financial Decisions				
Seeking and Negotiating Contracts				
Management Decisions				
Accepting and Rejecting Bids				

6. Work history: Please list your last 5 clients, the work performed, when the work began and when the work ended or if its ongoing.

Client	Work Performed	Date work began	Date work ended or ongoing

7. Construction Companies ONLY

a. List last five jobs completed or on-going. Use additional sheets if necessary.

Project Name (List awarding Department if Public Agency	Architect, Owner or General Contractor (Indicate address and phone #)	Your Company's Contract Price	Your Company's Start Date	Your Company's End Date or % Completed	Your Company's Bond Amount

b. List items used in the business, specify whether items are owned or rented/leased

Construction Equipment	Owned	Leased	Rented

Office Equipment	Owned	Leased	Rented

For Data Entry Purposes, please fill out the following information:

8. Please select up to three UNSPSC codes from the [UNSPSC List](#) that best describes your business or search for codes at www.unspsc.org/search-code.

UNSPSC Codes: [1] [2] [3]

9. Please select up to three [North American Industry Classification System codes](#) from the NAICS List of Short Titles that best describe your business.

NAICS Codes: [1] [2] [3]

10. Has this company done business with the City of Boston or any of its affiliate agencies in the past?

Yes No

If yes, please mark all that apply:

City of Boston, include Vendor ID # _____

Boston Redevelopment Authority

Boston School Department

Boston Water and Sewer Commission

Boston Housing Authority

Economic Development Industrial Corp.

Boston Public Health Commission

11. Small, Small Local, Minority or Woman Business Certification by owner(s) or principals:

I hereby certify that _____
Print Full Name of Business

is a Small, Small Local, Minority, or Woman Business Enterprise as defined below.

- a. Small Business Enterprise (SBE) means an independent business with gross receipts, when averaged over a three-year period, do not exceed gross income limitations for that particular industry as defined by the Small Local Business Enterprise Office.
- b. Minority Business Enterprise (MBE) means a business organization which is beneficially owned by one or more minority group members as follows:
 - i. The business must be at least 51% beneficially owned by minority group members.
 - ii. The minority owners must demonstrate that they have control over management.
 - iii. The firm has not been solely established for the purpose of taking advantage of a special program which has been developed to assist minority-owned businesses.
- c. Woman Business Enterprise (WBE) means an independent business organization which is beneficially owned by one or more women as follows:
 - i. The business must be at least 51% beneficially owned by a woman.
 - ii. The woman owner must demonstrate that she has control over management.
 - iii. The firm has not been solely established for the purpose of taking advantage of a special program which has been developed to assist woman-owned businesses.
- d. Beneficial owner and control shall be indicated by at least the following where applicable to the particular form of business organization:
 - i. Ownership of each class of stock.
 - ii. Unrestricted voting rights.
 - iii. Right to receive profits and all other benefits attached to ownership.
 - iv. Evidence of majority participation in the management of the enterprise.
- e. Small Local Business Enterprise (SLBE) means an independent business which is a Small Business Enterprise, as defined above, and whose principal office is physically located in the City of Boston, as defined by the SLBE certification regulations issued pursuant thereto.

The Office of Small Business Development reserves the right to deem the existence of any agreements, options, rights of conversion, or other restraints which may be exercised within three years, and which, if exercised, could reduce minority or woman ownership or control to less than the requisite percentage, to be grounds for rejection of the existing enterprise as a small, small local, minority or woman business enterprise.
- f. Minority means a citizen of or permanent resident of the United States who is Asian (including persons who have origins in any of the original peoples of the sub-continent of India), Black, Cape Verdean, Native American, or Hispanic/Latino.
- g. Woman means an adult female person.

Under pains and penalties of perjury, I swear that the above information contained in this application is true, complete, and accurate.

I acknowledge that the City of Boston Office of Small Business Development reserves the right to request additional information at any given time regarding certification.

Sign: _____

Print: _____

Title: _____

Date: _____